

FY14 Research Request Ideas

1. Total trip costs compared to trip costs in MT & Understanding planning horizon

It would be interesting to know how much a visitor's total trip cost is and how much of it is just what they spent while they were here. We hear a lot that the cost to get to MT is a barrier to more people coming here and it would be interesting to see data that reflects the reality. Additionally, we're always trying to understand the planning and booking timeframe. We see anecdotally from our own bookings that the planning phase has lengthened (people always dreaming and thinking about a vacation), but the booking when they actually get serious and pull the trigger has shortened. It would be great to better understand this.

2. Student employment and summer break

Pertaining to tourism jobs, I am curious as to the present relationship of Montana college students to summer tourism jobs with regard to their availability, desire to work in the industry and what job types are acceptable to them during the summer break. As schools have switched from the quarterly system to semesters, the breaks have shifted from mid June to mid September, which did match the high tourist season in Montana, to a less compatible early May to mid August period. What effect has this had on job availability from both the employee and employer? An additional general question might be: What percentage of Montana college students work full or part time summer jobs and in what industries and job types? Summer seasonal labor is an issue for the tourism industry in Montana. Shedding some light on this labor force source might be helpful in policy decisions.

3. Lodging and B&B research

- What type of lodging are potential visitors looking for?
- Why do they choose it?
- Why stay at a hotel as opposed to a B&B?
- Would they consider staying at a B&B?
- What can the B&B industry in Montana do to garner more room stays?
- What is the best way to compete with larger hotel chains in advertising?

The National Association of Innkeepers conducted a large nationwide study and found that most travelers don't even think about staying at a B&B. So, in many cases, a bed and breakfast isn't even on the radar screen. The MTBBA is interested in looking at these issues within Montana. We would like to learn how to better target our marketing to attract potential guests.

4. Wedding tourism

It would be of great interest to find out: Any data that could be collected on tourists traveling to Montana for a Montana wedding, then added 1-3 days to tour Glacier or Yellowstone.

5. Fire impact on tourism and policy related to fires

First, how have the fires impacted Montana businesses in the areas that are inundated with smoke? Second, what is the opinion of business owners in Montana and travelers of the federal government's "Let It Burn" policy, and is it time for a new approach?

6. Making tourism sustainable year-round

In response to your request for research ideas related to Montana tourism, I completed a research study during July 2012 entitled 'Economic regeneration in the Glacier National Park area of Montana, USA: rebranding the area as a four-season tourist destination and the role of the local business owner.' The report is very rudimentary and warrants further investigation, however, I believe the subject area is very relevant to your research themes.

My area of interest specifically relates to how the knowledge and experience of the various stakeholders such as business owners, local residents, government agencies and tourism associations can best be utilized to encourage a pooling of ideas via a process that encourages open communication, understanding of often opposing needs and a collaborative approach to strategies for growth.

I spent a great deal of time in the Glacier National Park area between 2007 and 2010. During that time and through my association with a lodge (and thus with other local business owners), I was able to get a unique perspective on some of the prevalent issues facing business owners in the area (such as red tape that curtailed opportunities for year round recreation and

other ways where conservation needs and business needs needed to dovetail rather than oppose). I was able to see how the biggest issue preventing sustainable growth was a lack of understanding of the needs of the various stakeholders. The recognition of this led to the attached research.

I feel very passionately that there is currently a great opportunity within the tourist industry to create sustainable growth by taking a stakeholder approach as detailed in the attached report, and I would love the opportunity to be actively involved in further research and in developing practical frameworks that will enable progress to be made.

7. Economic impact of bicycle tourism in MT

In regards to the request for research ideas, one I would purpose falls into Travel Behavior partially Measurement and conservation. It is understanding the value of bicycle travel in, through and to Montana. I believe 5 ACA bike routes cross the state. Bicycle travelers go slowly, they depend on small towns, they are invisible economically because no one has ever measured their impact.

The other bicycling groups that make an economic impact are the tour groups that bring groups to cycle in Glacier and Yellowstone for a week to seven days. The Park Service requires permits for those companies and has records of numbers of riders. Event rides bring in many people to one location: they bring an economic boost to those communities. It would take minor research to list all of the ways, rides, route, groups, etc. but to get a measure on the economic impact would be interesting.

My business actually tracks the dollars bicyclist spend each year. I would imagine it would take a lot of work to get concrete figures, but if you could, it would be enlightening!

8. Music Tourism

My main job in life is helping the arts industry and specifically the MUSIC industry to thrive and communicate their message about culture and art.

The big elephant in the room when measuring tourist industry impacts in Montana is that ITTR never does research about how the ARTS specifically and CULTURE secondarily affect tourists decision making process. (I have seen some stats on 'culture' but it is not clearly defined and seems to be a by-product question about 'things to do'.

The question is rarely asked of tourists about whether they come to Montana to see a specific concert...i.e. a band playing at an event. Or HOW much the tourist knows about the arts and culture options for them when they visit. I would also like to see some measurement about how ARTS and CULTURE impact the state's economy...if we don't ask the questions we will never know just how much people, especially tourists, spend to enjoy our rich, vast arts community.

9. Impact of Vacation Rental Visitors on Economy and Visitor's Experience

As a vacation rental owner, we know that our visitors have an incredible experience because they spend a full week at our property rather than moving from motel to motel. By staying in one spot, the visitor is immersed in a particular area and has the opportunity to visit the nearby small towns while learning about their way of life, and contributing economically to the area. Some call this 'slow tourism.' It provides a unique experience. A good research project would be to understand how this slow tourism both impacts that visitor's experience and how it impacts the local area. It is one of the many contributing pieces of the variety of tourism in Montana. Is there a difference in quality of visitor experience by accommodation type?

10. Technology use for planning and visiting (2 requests)

My suggestion was a study on how visitors to Montana use technology to plan a visit, and how it's used throughout visit. i.e. The use of review sites (Trip Advisor, Yelp, etc) vs destination websites. Tendency to click on Google adwords, Bing ads and Facebook ads. The use of social media. Preferences on booking lodging and activities. Technological expectations of destinations visited in Montana. How mobile technology and apps are used during visit.

11. Search Engine Research

Research into the search engines that are most effective in gaining responses. I have not had anyone comment that they have seen our place on the Montana site. People all over love Montana so how to hook them into your site quickly and easily

12. Gateway Community Infrastructure study

It would be nice to know what amenities are lacking in our National Park gateway communities from a non-resident visitor perspective. Would things like a doggy-day care, wifi hot spots, expanded food options, etc, make us a more desirable Park to

visit? With so many restrictions and limitations inside a national park, what are the gateway communities lacking to entice a longer stay or repeat visit? Oh, and my thoughts can be expanded to resident national park visitors too. Many are more than day-trippers and may require certain amenities to entice them to stay longer or spend more \$\$.

13. Conversion of visitors to investors and employers

I encourage ITRR and the Research Committee of TAC to consider a study that looks at the conversion of visitors to investors and employers. We promote tourism as an industry that is a precursor to relocation, investment of second homes and retirement, and as a place to open or relocate a business. We know that is occurring, but do not have anything more than anecdotal information to back this up. Data such as this will better position Tourism as an “economic development driver” and not merely an industry of “low wage service industry jobs”.

14. Perceptions of Montana’s Issues – do they affect visitation?

What do visitors know about the issues that Montanan’s grapple with such as wolves, bison, grizzly bears, forest fires, access to lands, bark beetle and so forth? How does (or could) this knowledge impact visitation to and perception of Montana?

15. Wolf issues and visitor perception

What is the impact of wolf hunting and trapping on the perception visitors or potential visitors have of Montana?

16. Before and after Gateway Community development

The Gardiner Gateway Project is a revitalization of the community of Gardiner and the North Entrance to the world's first national park. We were hoping that you could continue your research on gateway communities to federal lands and how improving public infrastructure especially infrastructure used by visitors could potentially have an increased tourism and economic development for the gateway community (ie visitors would not just use the community as a pass-thru to the federal land, but more as a destination as well). I suppose the need would be to look at before and after statistics all over the state, but as a community that has little improvement in 30+ years and is on the verge of what we hope is a large scale public infrastructure improvement, we thought you could use Gardiner as a before and possibly after location. The project website is <http://gardinergatewayproject.org/>.

17. Route choice research

Travel Behavior in regards to both resident and nonresident activities, destination choice criteria, route choice, and perceptions of Montana: Route choice is important to Central Montana – are they interstate travelers or willing to get onto some blue highways? Is their route planned in advance or, are they influenced along the way? Do billboards and signage influence their route or their stops in a destination?

18. Enroute traveler information use

Travel Promotion and its relationship to technology and information sources: This topic is also important to us. We’d like to know if visitors to Montana are using printed material, are they using the internet to scout a place or to plan trips. Are people using smart phones to plan or smart phones enroute (when cell service is available)? Are they frustrated by inability to connect while in Montana?

19. Who are High Value, Low Impact visitors?

There is always talk about promoting to the high value, low impact visitor. Determine what makes them a high value, low impact, then survey nonresidents to learn more about those types of desired visitors. Do we have them here? Are they a better choice for Montana? Can Montana really ‘choose’ who to have visit the state?

20. Golf Tourism

Would like to suggest an impact of golf study by ITRR. Is this something that could be added to the list of suggested studies for consideration by TAC?

21. Resident vs Non-residents staying at MT motel/hotels

I would request a study be done to determine the proportion of residents to nonresidents staying in Montana hotels and motels. This study would then help determine the proportion of accommodations taxes paid by residents and nonresidents. This research could be used by the tourism business improvement districts across the state in developing their marketing plans; where should they be marketing within the state or outside. MH&LA could be influential in getting members to submit their information to ITRR. Most hotel property management systems can export data of guests staying in the hotel by zip code.

22. Quantifying the value of wilderness to visitors

I think it would be valuable to quantify the value of Wilderness to our visitors.

23. Understanding the guest ranch visitor

As a guest ranch I would be like to know what percentage of guest ranches in MT book by the week vs. Resort style where guests can come in and out on any day. Additionally, if they book by the week, what percentage are 6 night vs. 7 nights? This may not be exactly the type of questions you are looking for but thought I would run it by you.

24. On-going Research: Nonresident Study, Monitoring, Outlook, Data Mining

These studies provide continual data on nonresidents to MT including economic impact and secondary data monitoring which get uploaded to the 'Customize your Report' website; outlook survey and presentations with the BBER Outlook Seminars; and time to analyze current data to answer specific questions throughout the year.

25. International Visitors

Would be interested in knowing international visitor numbers and how international visitors arrive in the state, the airport they hub through, country of origin, and also commercial vs. private aircraft , especially into the Bozeman Yellowstone International Airport.

26. International Visitor Characteristics & Numbers

Over the past two years, Yellowstone Park has recorded a significant increase in the number of bus visits and busses entering the gates. Anecdotally, we see an increasing number of international visitors, from more countries, also traveling independently (FIT). How will an increase in international travelers impact Montana?

- Is this accurate?
 - Is there an increase in the number of international travelers coming to Yellowstone and Glacier Parks, and Montana? Are the number of foreign independent travelers increasing? Is independent travel becoming a greater percentage of international travelers?
 - Are there changing geographies of origination? More visitors from India, China, etc. Are there any emerging visitor profiles for international travelers? Does it differ by country?
 - Can the non-resident survey data be analyzed by country? Can visitor profiles be developed?
 - Can RMI be a partner in this project (or another partner)? Would they survey tour operators for relevant data about tours?
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27. Nordic ski market

Gain a better understanding of the destination Nordic market using a one-page version of the alpine ski market study. Use a modified "survey" in the box method by identifying retail or trail locations that would be willing to distribute surveys to folks renting Nordic Ski's (more than a daily rental) to destination travelers. If you think this is at all possible, let me know and I can provide more specifics.

NOT RESEARCH but comments we received

9. We are 2.25 miles south on Hwy 87 from the turnoff to the south part of Havre, which has the hospital, college, etc. This turnoff is on Old Post Road. Many people live along Post Road. The road is very narrow, with no shoulder. For everyone from our campers to the residents along post road, there is a need for a bicycle path to town along Old Post Road. I see people bicycling along that road and wonder why no one has been hit by a car yet.

With the nation's interest growing in health and exercise, a bicycle path would provide this place for safe exercise.

I would like to see the TAC-RC re-address the issue of a comprehensive event and concert calendar. I've spoken with folks at Lively Times who say they haven't heard from you for years. The price they quoted me for accessing their data base seemed very reasonable, and was FAR less than what was told me at the last meeting.

The major airport just north of Montana is Calgary International Airport (YYC), the 4th largest in Canada. Calgary has daily flights from Europe as well as charter flights coming in from Zurich, London, Munich, Frankfurt, Amsterdam, Manchester, Glasgow. Calgary also has flights direct from Japan. Montana Tourism does not mention this airport or others around Montana, i.e. Salt Lake, Denver as they do not fund Montana Tourism.

- Get Lost in Montana. When this first was broadcast on the TV/Radio they mention MT instead of Montana. Suggest an international viewing client questioning what is MT. I think this has been changed to Montana.
- If you are spending all the advertising money on "Get Lost Montana" consider mentioning Whitefish/Kalispell where a lot of Canadian Skiers head each year.
- Montana Tourism Brochure. Mention those bus/van companies bringing clients to/from Montana. As I understand it we cannot be mentioned as we are not a Montana "local" tax base business.

Airport Shuttle Express operates a year-round charter van service to/from Montana. We operate from Calgary and Banff to Kalispell/Whitefish, East Glacier and Great Falls. Most of our clients are Europeans and Americans who are using the Calgary International Airport (YYC) as their starting point for their North American holiday.

Concerning tourism and trade between Lethbridge, Alberta and NW Montana....there is and has been an 8-10 mile section of gravel road on rt. 444 between Browning and the Del Bonita crossing into Canada for the last 20 years.

I travel it and wonder when this barrier within the five hour drive-time of Lethbridge to Kalispell, Whitefish and Flathead Lake will be improved. There must be a reason for such a poor road but the people at both the Canadian and the US border crossings do not know what it is. Please help me identify the problem here as there must be something that we can do to remove this barrier by improving the basic roadway on rt.444. The Chambers of the Flathead Valley and Lethbridge would also thanks you.

I would like to see if someone could get the state to make people fix their auto's to keep them from being so loud, the noise from the truckers and motor bikes are terrible. We had a lot of complaints on noise this year, and dust. We did not get much smoke but we get a lot of dust from Forest Service Road. Wish that could be solved.

The other complaint we get is why don't Park construction work under the lights like they did before. Leave the day time for us tourist. Glacier Park Needs more parking and more buses to take care of all the people. This has been our biggest complaint from the tourist this summer.

The tourist want more information about Glacier Park while touring the park. Like a Museum of things from the past. Don't get enough information. Hope this gives you some idea of what we hear.

I have been quite successful getting out-of-state visitors to my vacation rental, but the Montana market has been difficult to break into! Perhaps, instead of concentrating so much time and energy of trying to seduce people to visit Montana, we need to try to get Montanans to stay and explore our own many destinations.

I think we here in Montana are so used to driving long distances to do anything, that we don't seem to plan a get-away like other people do...more of a "let's head this direction and see what happens" attitude.

The Big Horn River and Lake are prime examples of this. Weekends, especially during summer months, Highway 313 is a steady stream of people pulling lake boats and drift boats. Most are there just for the day - and many probably don't get onto the water until noon or later! So they're able to fish or waterski, etc. for a few hours then load everything up and go back to Billings! That is approx. 4 hours driving time, who knows how much preparation time, fuel expenses, food and beverages...all for a few hours on the water! It's silly and wasteful. A few do pull a camper and set it up in a parking lot for the night...that seems like a lot of work to have to spend a night on asphalt!

I was contacted by a woman in Missoula this past spring, and she rented my house for a week. She said their past visits to Big Horn Valley involved her driving a pickup pulling a camper, while her husband drove a vehicle pulling the boat...all the way from Missoula! This time they rented my house and said they will never go back to dragging the camper down again! Also, their friends from Kansas did not have to bring their camper - the house was big enough to accommodate all of them, so they actually saved a lot of money.

I am rambling again, but I hope you get the drift of where I am going with this; let's keep Montana money in Montana! Everybody wins!

We are a small, eco-lodging facility on the edge of Glacier Park and have been in business for eight years. One of the issues we see cropping up from time to time involves the lack of guided hiking in the park. Guests can take a ranger-led hike in the park and these are uniformly enjoyed, judging by the feedback we have heard, but when it comes to non-ranger guide trips there is only one outfitter permitted to guide hikes in the park itself (this does not include rafting/fishing, of which there are several businesses to choose from.) At least this is our understanding of the situation. It may be that no one else has tried to get a permit, although that seems hard to believe, however right now as it stands someone desiring a guide has only one business to choose from. I won't name names because I am not advocating one way or the other about this guide service, only questioning if there is only one business allowed, what is the reasoning, if any, why this would be. This seems detrimental to tourism and commerce in our opinion.

Many of our guests complain about the traffic density in both Glacier and Yellowstone in the summer. We know this is an on-going concern and we are well aware of the arguments pro and con about limiting traffic. We have visited Zion National Park, UT, where shuttles are the only way to access the park, and found the whole experience to be so much superior, quieter, etc. Perhaps this issue could be revisited and some solutions proposed. Talk about opening a can of worms....
Thank you.

Our ability to attract international visitors is vastly improved when we have well coordinated tour packages that present a diverse itinerary. How do you incorporate the small business community in itinerary development and also the distinct cultural and historic interpretations related to Native Americans and other unique cultural perspectives?

1. Conservation and its relationship to tourism, sustainability, Geotourism and public lands;
2. Development as it relates to partnerships with agencies, nearby states and provinces, gateway communities, and new alliances with retail, gas stations, restaurants, and Native Americans as well as Education as it relates to elected officials and residents;
3. Measurement needs for understanding tourism jobs, businesses, public land contributions to tourism, and spending behaviors;
4. Travel Behavior in regards to both resident and nonresident activities, destination choice criteria, route choice, and perceptions of Montana;
5. Travel Promotion and its relationship to technology and information sources.

Thanks for allowing us to make requests. I attended the Voices of Tourism meeting this morning and one of the elected officials mentioned that the general fund only gets \$15 million economic impact from tourism in Montana. Afterward, I found out he was referring to the amount of bed tax that is retained in the general fund from the total bed tax collections. Would it be possible to gather a more robust data set to measure true economic impact? I know our board would be very interested in see these numbers related to visitor activity in our area and the state.

I realize you folks are just trying to do your jobs, but the reality of the matter is until this economy rebounds and I wouldn't hold my breath there especially with the present administration in Washington , not to mention Montana..you're going to see a consistent decline in visitors...Look what I 161 did to non resident hunters... I still think the FWP has a abundance of un sold non resident hunting licenses for this year...I hear complaints a lot from non residents... One of the first questions I get from a new inquiring hunter is...DO YOU HAVE A WOLF PROBLEM...These hunters are anything but stupid... when they pay 4 to 5 thousand dollars for hunt and all they see is wolves, grizzlie bears and mountain lions, they are going to start seeking other states..

Montana does not have a monopoly on big game... on the contrary...

Its a fact that the first thing people quit spending money on in economies like this is collectables and vacations...

Good luck with you endeavors, but until montana gets a whole new FWP especially the director, and becomes more business and non resident friendly, one day your job could begin to dwindle...the trickle effect could grow expotentially, and i feel no one will be immune...

This letter is sent not to aggravate anyone, but to tell it how it really is and what is coming, and I think you can take that to the bank young lady...

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